School Year Initialization Step by Step Checklist

School Year Initialization (SYI)

 The SYI process is typically performed in January or February in order to configure the following school year. The SYI Tasks must be executed by the ITC, by the District, and by the Building in that order. Some ITC's wish to initialize all of their buildings. Others allow their districts to run the SYI tasks at the district and building level. Please consult your ITC to determine how initializations are handled. Unless otherwise noted, see **School Year Initialization End User Guide.**

NOTE: The SYI process does not add students to the new school year. Consult the **Student Promotion Step by Step Checklist** step by step instructions. SYI must be completed at all three levels before students can be promoted and bulk enrolled into the new school year.

NOTE: Initialization is processed in a three-part procedure: Initialize the ITC level (once), Initialize the District level (once per district), and Initialize the Building level (once per building). In other words, if a district has 10 buildings SYI will need to be completed once at the district level and at each of the 10 buildings.

Change Log

Date	Section Number/Name	Change Description
11/05/18	Entire doc	Updates fro 2019/2020 school year
11/22/17	Entire doc	Updates for 2018/2019 school year
11/22/17	Task #4	Added update for Start/End Time on Calendar & Start/Stop Times on Periods
10/24/16	Entire doc	Updates for 2017/2018 school year
12/9/15	Task #4	Add clarification about entering a Date Range for non-attending days
12/1/15	Entire doc	Updates for 2016/2017 school year
12/8/14	Task #6,8,10	Corrected screen shot of passes
12/4/14	Entire doc	Updates for 2015/2016 school year
10/7/14	Entire doc	Updated Screen shots
11/25/13	Task #9 Task #10	Added screenshot back Clarified running last 5 + Fee Proration task
11/15/13	Entire doc	Updates for 2014-2015 school yr (Fee proration task in 3rd pass)
12/06/12	Task #7	Fixed screenshot
11/15/12	Entire doc	Updates for 2013-2014 school yr

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Task #1 – Verify the 19/20 school year appears in the dropdown.

Please contact your ITC if 19/20 does not appear in the dropdown.

Task #2 - Initialize the ITC level for the new school year

You will only need to run the ITC level tasks once for the entire ITC.

Only ITC Personnel have the security permissions to initialize the ITC level.

1. Change context to the ITC and 19/20.
2. Navigate to: **StudentInformation » Management » School Administration » School Year Initialization » Execute Tasks**.
3. On the first tab named **Module Task List** click the **Execute Now** button for the first 8 tasks. (**Student : Profile** thru **Marks : Marks Configuration**).
   a. Click the **Next** button.
4. Now you are on the second tab named **Required Information**.
   a. In the **Source School Year** dropdown, choose 18/19 since we are copying data from this school year to 19/20.
   b. Click **Next**.
5. Now you are on the third tab named **Confirmation**.
6. Click **Execute**.
   a. Your screen will flicker while StudentInformation processes through the selected tasks.
   b. As each task finishes, the **Status** of the task will change from **Pending** to **Complete** or **Failed**.
   c. If any of the tasks **Failed,** report them to State Support in a Help Desk ticket and discontinue SYI until you hear back from State Support.
   d. Also, if you setup any ITC level codes you will want to click **View Log** to view any information messages and to make sure the codes copied properly.
   e. If all the tasks completed and you do not have any codes setup at the ITC level, you can skip **View Log**.
   f. Otherwise, if you are ready to proceed and finish the remaining tasks, click **Execute More Tasks**.
7. Now you are back on the first tab.
   a. You should see a checkmark in the **Completed** column for the tasks that were successfully executed.
   b. You can now click the **Execute Now** button for the remaining two tasks: **Scheduling : Course Configuration** and **Course History**.
   c. Click Next.
8. In the **Source School Year** dropdown, choose 18/19 since we are copying data from this school year to next school year.
   a. Click **Next**.
9. Now you are on the **Confirmation** tab.
   a. Click **Execute**.
10. Now you are on the fourth tab. Your screen will flicker as StudentInformation processes the tasks.

a. The status of the tasks will change from **Pending** to **Completed**.
b. Congratulations! You have just completed initialization at the ITC level.
11. Now you can initialize the District level.

Execute School Year Initialization Tasks

This wizard will allow you to initialize a school year step by step

| Module Task List | Required Information | Confirmation | Results |

Step 1: Module Task List
For each module on the task list, select the desired action and click 'Next'.

Module Name	Module Description	Do Not Execute	Skip	Execute Now	Completed	
Student: Profile	Copies code values to support student profiles but no student specific data	●	○	○	☑	
Student: Admission	Copies the code values to support student admissions and creates Sub Calendar entries, but does not copy any student specific data	●	○	○	☑	1st Pass
Student: Memberships	Copies membership groups and memberships	●	○	○	☑	
Discipline	Copies code values for discipline	●	○	○	☑	
Fees	Copies basic fee configuration excluding course and course section fees	●	○	○	☑	
Attendance: Absence Events	Copies configuration and code values used by attendance	●	○	○	☑	
Attendance: Absence Letters	Copies configuration used to generate absence letters	●	○	○	☑	
Marks: Mark Configuration	Copies configuration to support marks	●	○	○	☑	
Scheduling: Course Configuration	Copies code configuration used by course master	●	○	○	☑	
Course History	Copies configuration used to support course history	●	○	○	☑	2nd Pass

Next >

Task #3 - Initialize the District level for the new school year

You will need to run the District level tasks for each District in your ITC.

1. Change context to the District and 19/20.
2. Navigate to *: StudentInformation » Management » School Administration » School Year Initialization » Execute Tasks*.
3. On the first tab named **Module Task List,** click the **Execute Now** button for the first 11 tasks EXCEPT **Student: Admission**. (**School : Configuration** thru **Marks : Marks Configuration**).
   a. Click **Next** .
4. Now you are on the second tab named **Required Information**.
   a. In the **Source School Year** dropdown, choose 18/19.
   b. Leave the **Locker Combination Series** blank. You will have an opportunity to update the locker combination series at the building level.
   c. Click **Next**.
5. Now you are on the third tab named **Confirmation**.
   a. Click **Execute**.
   b. Your screen will flicker while StudentInformation processes through the selected tasks.
   c. As each task finishes the **Status** of the task will change from **Pending** to **Complete** or **Failed**.
   d. If any of the tasks **Failed,** submit a Help Desk Ticket. Discontinue with SYI until you have heard back from State Support.
6. Next, you will want to navigate to : **StudentInformation » Management » School Administration » School Year Initialization » Follow-up Checklist**.
   a. If you have any codes setup at the district level, you will want to complete the follow-up checklist task. For example: If attendance codes are setup at the district level, you will want to make sure you complete the follow-up tasks for **Attendance : Absence Events**.
   b. You can click on the **Go To** link for the desired task and the link will take you to the necessary page to verify the data copied to 19/20.
   c. If you find an issue with data copying up, please submit a Help Desk ticket. Discontinue the SYI process until you have heard from State Support.
   d. One important thing to note is Staff members are copied to the new school year when you run initialization at the district level, but staff job functions are not copied to the new school year until initialization is run at the building level.
   e. Now we are ready to return to the **Execute Tasks** page to finish the initialization process.
7. Navigate back to : **StudentInformation » Management » School Administration » School Year Initialization » Execute Tasks**.

8. You should be on the first tab.
    a. You should see a checkmark in the **Completed** column for the tasks that were successfully executed in the steps above.
    b. You can now click the **Execute Now** button for the remaining three tasks: **Student: Admission**, **Scheduling : Course Configuration** and **Course History**.
    c. Click **Next**.
9. Choose 18/19 for the **Source School Year**.
    a. Click **Next**.
10. Now you are on the **Confirmation** tab.
    a. Click **Execute**.
11. Now you are on the fourth tab. Your screen will flicker as StudentInformation processes the tasks.
    a. The **Status** of the tasks will change from **Pending** to **Completed** or **Failed.**
12. You will want to go back to the **Follow-up Checklist** page and complete the follow-up checklist for any items you have configured at the district level.
13. Congratulations! You've just completed initialization at the District level.
14. Now you are ready to proceed onto the Building level.

Execute School Year Initialization Tasks

This wizard will allow you to initialize a school year step by step

Module Task List	Required Information	Confirmation	Results

Step 1: Module Task List
For each module on the task list, select the desired action and click 'Next'.

Module Name	Module Description	Do Not Execute	Skip	Execute Now	Completed
School: Configuration	Copies basic school configuration settings to the new school year	◉	○	○	☐
School: Staff Members	Copies the roles and settings for staff members	◉	○	○	☐
Student: Profile	Copies code values to support student profiles but no student specific data	◉	○	○	☐
Student: Admission	Copies the code values to support student admissions and creates Sub Calendar entries, but does not copy any student specific data	◉	○	○	☐
Student: Memberships	Copies membership groups and memberships	◉	○	○	☐
Discipline	Copies code values for discipline	◉	○	○	☐
Fees	Copies basic fee configuration excluding course and course section fees	◉	○	○	☐
Fee Proration	Copies fee prorations and proration details	◉	○	○	☐
Attendance: Absence Events	Copies configuration and code values used by attendance	◉	○	○	☐
Attendance: Absence Letters	Copies configuration used to generate absence letters	◉	○	○	☐
Marks: Mark Configuration	Copies configuration to support marks	◉	○	○	☐
Scheduling: Course Configuration	Copies code configuration used by course master	◉	○	○	☐
Course History	Copies configuration used to support course history	◉	○	○	☐

1st Pass
2nd Pass
1st Pass
2nd Pass

Task #4 - Run Calendar Wizard at the building level

This step creates the school building's master calendar, course terms, periods of the day, rotation days, and reporting terms.

Allow yourself plenty of uninterrupted time to complete this task. The next set of steps must be done in its entirety. If you become distracted and navigate from the page all information you have entered will be lost.

Schools have the ability to start scheduling before a district's school calendar has been approved for the upcoming school year. However, it is still preferred to have the district's calendar in hand when you do SYI. If fictitious dates are used to complete the Calendar Wizard there will be additional steps to correct the dates. Please see the Calendar Procedural Checklists.

Non-attending days should be entered during the Calendar Wizard task so they are included on the master calendar. Once SYI is complete, refer to the Calendar with EMIS Exceptions Procedural Checklist to add the EMIS exceptions for 19/20 to the applicable sub-calendars.

Helpful Hint – Print screenshot of the following pages in 18/19 to ensure code and names match.

1. *StudentInformation » Management » School Administration » Scheduling Administration » Initialization » Reporting Terms Maintenance*
2. *StudentInformation » Management » School Administration » Scheduling Administration » Initialization » Course Terms*
3. *StudentInformation » Management » School Administration » Scheduling Administration » Sub-Calendars*
4. *StudentInformation » Management » School Administration » Scheduling Administration » Initialization » Periods of the Day*
5. *StudentInformation » Management » School Administration » Scheduling Administration » Initialization » Master Calendar Periods*
6. *StudentInformation » Management » School Administration » Scheduling Administration » Initialization » Rotation Days*

WARNING WHEN RE-RUNNING CALENDAR WIZARD! Use extreme caution when re-running Calendar Wizard. Rerunning Calendar Wizard wipes out course section assignments – this cannot be restored. One of the tasks undone by rerunning Calendar Wizard is Student: Admission. All admission history will be deleted. Students will still be searchable in the current school year, but will have no Intrabuilding Progression or Building Admissions for the current school year. Student Promotion / Bulk Enrollment will need to be redone. Please consult the School Year Initialization Step by Step Checklist – Appendix section for more information on rerunning Calendar Wizard.

When the Calendar Wizard loads, if it has been run before, the following message will appear:

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

Are you sure you want to run the Calendar Wizard again?
All Absences, Marks, GPA/Honor Rolls, Marking Patterns, Course Section Assignments, Schedules, Homerooms, and Terms will be deleted and you will need to rerun Student Promotion and Student Bulk Enrollment.
To continue, click OK, otherwise click Cancel.

OK   Cancel

If you hit Cancel, the following message will appear:

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

You have chosen not to re-run the Calendar Wizard.

1. Change the context to the building level and 19/20.
2. Navigate to : ***StudentInformation*** *» **Management** » **School Administration** » **School Building Administration** » **Calendar Wizard**.*
3. Now you are on the first tab of the Calendar Wizard named ***General***.
   a. The ***Master Calendar Code*** and ***Master Calendar Name*** are defaulted to the word ***Master***. State Support recommends not changing the names at this time.
   b. Enter the ***Start Date*** for next year. The example screenshots following this task use the ***Start Date*** of 09/03/19 HINT: Make sure you use the correct year.
   c. Enter the ***End Date*** for next year. The The example screenshots following this task use the ***End Date*** of 05/28/20. HINT: Make sure you use the correct year.
   d. If the school isn't sure when school will start or end you can guess and enter fictitious dates. These dates can be changed at a later time.
   e. Enter ***Daily Start Time*** & ***Daily Stop Time***. This will be the standard Start & Stop time for the Master Calendar for the school year and will be used in calculating attendance.
   f. You will want to make sure you are not using Saturdays or Sundays as the 1st or last day of school, unless Saturdays and Sundays are legitimate school days.
   g. The ***Instructional Weeks on which to base Calendar*** field is defaulted to ***36***. State Support recommends not changing that.
   h. Next, you will need to mark ***Attending Days***. 99.99% of schools will choose Monday through Friday.
   i. Click ***Next***.
4. Now you are on the second tab named ***Reporting Terms***.
   a. On this tab you tell StudentInformation how often you print report cards, which length of courses you offer, and the Reporting Term stop dates.
   b. Please Note : Whatever you choose in the ***Report Card Frequency*** dropdown determines which Reporting Terms are locked on the Reporting Terms Maintenance screen.
   c. A good percentage of schools hand out report cards every quarter. 4 Quarters (9 weeks each) was chosen in the screenshot example below.
   d. The ***Select Course Lengths Used*** filter determines the breakdown of your schedule terms. If your school definitely offers 9 week courses and there is a possibility they may offer 12 week courses, you would want to make sure you pulled 9 weeks and 12 weeks over to the right of the filter box.
   e. 9, 12, 18 and 36 week course lengths were chosen in the example following this task. The lowest common denominator of 9 and 12 is 3. So, this school will have 3 week schedule terms. If I had chosen 9 week and 7 week courses the lowest common denominator would be 1 week and this school would have their schedule terms broken down into 1 week increments.

f.   If there is any uncertainty about which course lengths the school will be offering next year, select all course lengths that have a possibility of being offered. StudentInformation does not require all the course lengths chosen to be used.

g.   Now it is time to fill in the Reporting Term **Stop Date** fields.

h.   The example screenshots following this task use 10/19/18 for the Quarter 1 **Stop Date**.

i.   The example screenshots following this task use 01/11/19 for the Quarter 2 **Stop Date**.

j.   The example screenshots following this task use 03/15/19 for the Quarter 3 *Stop Date*.

k.   Quarter 4 **Stop Date** is already filled in since it is the last day of school.

l.   Click **Next**.

5.   Now you are on the third tab named **Virtual Terms**.

a.   This tab allows you to copy your virtual reporting terms from last year, which include interims, exams, averages, and finals.

b.   The **Copy Virtual Terms From** dropdown should be set to 18/19 since we are going to copy the virtual reporting terms from this year to next year.

c.   Click **Go**.

d.   Now use the up and down errors to move the virtual terms into the correct position.

e.   REMEMBER : If you are using interims, the interim Reporting Terms follow the locked reporting term. Example: Quarter 1 followed by Interim 1.

f.   Notice the virtuals do not have start and stop dates – this is by design.

g.   If not choosing to copy virtual reporting terms from last year and wish to enter them by hand, you can click **Add Virtual Term**.

h.   Note: Not all schools use virtual terms. If the school does not use virtual terms such as interims or finals, please skip this tab.

i.   Click **Next** to move to the fourth tab.

j.   A large majority of schools will want to choose to copy virtual reporting terms from last year.

6.   The fourth tab is named **Non-Attending Days**.

a.   If the school has determined which days are non-attending days, they can be entered now. Otherwise, these dates can be entered at a later time by editing the Master Calendar.

b.   Add a non-attending day by entering a **Date** or **Date Range**, **Day Type**, and optional **Note**. If entering a Date Range, only include Dates that fall on a Rotation Day (ex. Monday – Friday). Do not include non-Rotation Days (ex. Saturday – Sunday).

c.   Click **Add**.

d.   Repeat this process to add more non-attending days.

e.   Keep in mind that any day the students are not physically in the building is a non-attending day.

f.   Once the Non-Attending days have been entered, click **Next** to advance to the fifth tab.
7.   The fifth tab, named **Periods**, allows periods to be entered from scratch or copied from a prior year, just like the **Virtual Terms** tab.
   a.   To copy periods from last year, select 18/19 in the **Copy Periods From** dropdown.
   b.   Click **Go**.
   c.   To generate the periods from scratch, enter the number of periods in the **Generate Periods** box and click **Go**.
   d.   Rename the period codes and names to suit your needs but keep in mind, if the codes are not the same as last year, the meeting times on the course sections will not copy up properly to 19/20.
   e.   Enter **Start Time** and **Stop Time** on periods if applicable (lunch periods should have times entered or that time won't be deducted from absences during attendance calculations). The Start/Stop Times entered will be copied to the applicable periods for each rotation day & can be updated for individual rotation days later.

🗑 ⬆ ⬇	05 *	05 *		⊙		⊙
🗑 ⬆ ⬇	L1 *	Lunch 1 *	11:00 am	⊙	11:30 am	⊙
🗑 ⬆ ⬇	L2 *	Lunch 2 *	11:35 am	⊙	12:05 pm	⊙
🗑 ⬆ ⬇	L3 *	Lunch 3 *	12:10 pm	⊙	12:40 pm	⊙
🗑 ⬆ ⬇	06 *	06 *		⊙		⊙

   f.   99% of schools will use the **Copy Periods From** feature. State Support recommends using the **Copy Periods From** functionality because there is less chance of making a mistake.
   g.   If choosing to use the **Copy Periods From** feature and the school is no longer using a specific period - click the red **X** next to the period to delete it. NOTE: If course sections still have a meeting times assigned to this period, the meeting time will not copy over correctly to 19/20 and the meeting time in 19/20 will need to be manually corrected.
   h.   Once the periods have been configured, click **Next**.
8.   The sixth tab is named **Calendar Type**.
   a.   Choose a **Calendar Type** from the dropdown.
   b.   95% of schools should choose **Fixed Rotation Days**.
   c.   Choosing **Fixed Rotation Days** allows the ability to schedule classes that meet Monday and Wednesday or only Friday or everyday of the week. **Fixed Rotation Days** offers tremendous flexibility.
   d.   Once **Fixed Rotation Day** is selected another prompt appears named **# of Rotation Weeks**.
   e.   Again, 95% of schools will pick **1 Week**, which allows schools to schedule course section meeting times for Monday, Tuesday, Wednesday, Thursday, and Friday.
   f.   Picking **2 Week** allows the following setup: Monday1, Tuesday1, Wednesday1, Thursday1, Friday1, Monday2, Tuesday2, Wednesday2, Thursday2, and Friday2.

g. Very few schools will pick **2 Week**.
h. When in doubt, contact your ITC or send a Help Desk ticket to State Support for advice.
i. Adjust the **Code** and **Name** if needed, but keep in mind if the codes do not match what is in StudentInformation in 18/19, the meeting times on the course sections will not copy to 19/20 correctly.
j. Choosing **Fixed Day** allows only for courses that meet everyday of the week. There is no flexibility. Example: All courses meet Monday thru Friday, no exceptions. Use this option with caution.
k. When in doubt ,contact your ITC or send a Help Desk ticket to State Support for advice.
l. Very few schools will choose the **Alternating Rotation Days** from the dropdown.
m. Schools with Blue and Gold Days, for example, will choose **Alternating Rotation Day**.
n. If using Blue and Gold Days, choose **# of Alternating Days** equal to **2** and click **Go**.
o. Adjust the **Code** and **Name** to suit the school's needs. Again, if the code is changed and it does not match last year's code, the course section meeting times will not copy correctly to 19/20.
p. Click **Next** after the **Rotation Days** have been selected.

9. The final tab named **Projected Calendar** is a review of the reporting term start and stop dates and non-attending days.
a. Review the dates that have been entered and make any necessary changes before clicking **Finish**.
b. To make changes, click **Back** until the tab the changes are needed on is in context.
c. Once finished making changes, advance to the last tab and click **Finish** or if no changes were made, click **Finish**.
d. The following message will display : **The calendar was successfully saved**.
e. If you do not receive the above message or the Calendar Wizard times out or fails, contact your ITC or send a Help Desk ticket to State Support immediately.

Congratulations! Calendar Wizard is complete. Give yourself a pat on the back.

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

General	Reporting Terms	Virtual Terms	Non-Attending Days	Periods	Calendar Type	Projected Calendar

Master Calendar Code: * `Master`

Master Calendar Name: * `Master`

Start Date: * `09/03/2019`

End Date: * `05/28/2020`

Daily Start Time: * `08:00 am`

Daily Stop Time: * `03:00 pm`

Instructional Weeks on which to base Calendar: `36`

Attending Days

S	M	T	W	R	F	S
	✔	✔	✔	✔	✔	

[Next >] [Cancel]

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

| General | **Reporting Terms** | Virtual Terms | Non-Attending Days | Periods | Calendar Type | Projected Calendar |

Report Card Frequency:* [4 Quarters (9 weeks each) ▼] Only terms that can be expressed in whole or half weeks will be shown

Select Course Lengths Used*

```
0.5 Weeks            ▲        9.0 Weeks              ▲
1.0 Weeks                     12.0 Weeks
1.5 Weeks                     18.0 Weeks
3.0 Weeks                     36.0 Weeks
4.5 Weeks
6.0 Weeks
7.5 Weeks
9.0 Weeks
10.5 Weeks            ← →
12.0 Weeks            ⇐ ⇒
13.5 Weeks
15.0 Weeks
16.5 Weeks
18.0 Weeks
19.5 Weeks
21.0 Weeks
22.5 Weeks
24.0 Weeks           ▼                                ▼
```

Code:* [Qtr1]

Name:* [Quarter 1]

Stop Date:* [11/01/2019] 📅

Code:* [Qtr2]

Name:* [Quarter 2]

Stop Date:* [01/17/2020] 📅

Code:* [Qtr3]

Name:* [Quarter 3]

Stop Date:* [03/20/2020] 📅

Code:* [Qtr4]

Name:* [Quarter 4]

Stop Date:* [5/28/2020] 📅

[< Back] [Next >] [Cancel]

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

| General | Reporting Terms | Virtual Terms | Non-Attending Days | Periods | Calendar Type | Projected Calendar |

ℹ️ If you would like the system to copy Virtual Reporting Terms from a previous year, select a school year and select the 'Go' button. If you would like to manually add Virtual Reporting Terms, select the 'Add Virtual Term' button. To skip this step, select 'Next'.

Add Virtual Term   Copy Virtual Terms From: 2018-2019 ▼   **Go**

			Code	Name	Start Date	Stop Date	Sort Order
🗑		↓	Qtr1	Quarter 1	Sep 03, 2019	Nov 01, 2019	1
🗑	↑	↓	Int1	Interim 1			2
🗑	↑	↓	Qtr2	Quarter 2	Nov 02, 2019	Jan 17, 2020	3
🗑	↑	↓	Int2	Interim2			4
🗑	↑	↓	Ex1	Exam 1			5
🗑	↑	↓	Sem1	Semester 1			6
🗑	↑	↓	Qtr3	Quarter 3	Jan 18, 2020	Mar 20, 2020	7
🗑	↑	↓	Int3	Interim 3			8
🗑	↑	↓	Qtr4	Quarter 4	Mar 21, 2020	May 28, 2020	9
🗑	↑	↓	Int4	Interim 4			10
🗑	↑	↓	Ex2	Exam 2			11
🗑	↑	↓	Sem2	Semester 2			12
🗑	↑		Fin	Final			13

[< Back] [Next >] [Cancel]

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

| General | Reporting Terms | Virtual Terms | **Non-Attending Days** | Periods | Calendar Type | Projected Calendar |

Date:* [   ] 📅 Thru: [   ] 📅 Day Type:* [▼] Note: [   ] **Add**

	Date	Thru	Non-Attending Type	Note
🗑	Nov 18, 2019	Nov 19, 2019	Parent - Teacher Day	Parent/Teacher Conferences
🗑	Nov 20, 2019	Nov 22, 2019	Non Attending Day	Thanksgiving Break

[< Back] [Next >] [Cancel]

Calendar Wizard
From this screen, you can initialize a new calendar using a step-by-step wizard approach.

| General | Reporting Terms | Virtual Terms | Non-Attending Days | Periods | Calendar Type | Projected Calendar |

ℹ️ If you would like the system to **automatically** generate the correct number of periods in the grid, please enter the number of unique periods the school uses for the calendar and select the 'Go' button. Alternatively, you can copy the master calendar periods from a selected school year.

Generate Periods: [　　　] ⬍ [Go]　Copy Periods From: [2018-2019 ▼] [Go]

[Add Period]

			Code	Name	Start Time	Stop Time
🗑		⬇	1 *	1 *	[　　] 🕐	[　　] 🕐
🗑	⬆	⬇	2 *	2 *	[　　] 🕐	[　　] 🕐
🗑	⬆	⬇	3 *	3 *	[　　] 🕐	[　　] 🕐
🗑	⬆	⬇	4a *	4a *	11:30 am 🕐	11:55 am 🕐
🗑	⬆	⬇	4b *	4b *	12:00 pm 🕐	12:25 pm 🕐
🗑	⬆	⬇	W *	W *	[　　] 🕐	[　　] 🕐
🗑	⬆	⬇	5 *	5 *	[　　] 🕐	[　　] 🕐
🗑	⬆	⬇	6 *	6 *	[　　] 🕐	[　　] 🕐
🗑	⬆	⬇	7 *	7 *	[　　] 🕐	[　　] 🕐
🗑	⬆		8 *	8 *	[　　] 🕐	[　　] 🕐

[< Back] [Next >] [Cancel]

Calendar Wizard
From this screen, you can initialize a new calendar using a step-by-step wizard approach.

| General | Reporting Terms | Virtual Terms | Non-Attending Days | Periods | Calendar Type | Projected Calendar |

Calendar Type:* [Fixed Rotation Days ▼]

# of Rotation Weeks:* [1 Week ▼] [Go]

Rotation Days:

Code	Name
M *	Monday *
T *	Tuesday *
W *	Wednesday *
R *	Thursday *
F *	Friday *

[< Back] [Next >] [Cancel]

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

General	Reporting Terms	Virtual Terms	Non-Attending Days	Periods	Calendar Type	Projected Calendar

Calendar		Non-Attending/Attending
9/3/2019	Start of School Year	5/188
9/3/2019	Start of Quarter 1	0/44
11/1/2019	Last Day of Quarter 1	
11/4/2019	Start of Quarter 2	5/50
11/18/2019	Parent/Teacher Conferences	
11/19/2019	Parent/Teacher Conferences	
11/20/2019	Thanksgiving Break	
11/21/2019	Thanksgiving Break	
11/22/2019	Thanksgiving Break	
1/17/2020	Last Day of Quarter 2	
1/20/2020	Start of Quarter 3	0/45
3/20/2020	Last Day of Quarter 3	
3/23/2020	Start of Quarter 4	0/49
5/28/2020	Last Day of Quarter 4	
5/28/2020	Last Day of School Year	

[< Back] [Finish] [Cancel]

Task #5 - Complete the Follow-up Checklist before continuing

1. Navigate to **_StudentInformation_** **_» Management » School Administration » School Year Initialization » Follow-up Checklist_**.
2. The **_Follow-up Checklist_** contains four follow-up tasks.
3. First review the **_Periods of the Day_**.
   a. Click on the link **_Go to: Periods of the Day_**.
   b. Double check the periods on each rotation day to ensure they copied correctly from 18/19 to 19/20 and Start/Stop Times entered during Calendar Wizard are on the applicable periods for each rotation. Manually update Start/Stop Times if needed.
   c. Once you have reviewed the **_Periods of the Day,_** navigate to **_StudentInformation » Management » School Administration » School Year Initialization » Follow-up Checklist_**.

d. Put a check in the box next to **Completed** and click **Save** down at the bottom of the page.

e. You will notice the completed task does not appear on the Follow-up Checklist anymore. To view Completed and Incomplete tasks, uncheck **Incomplete Tasks Only** in the upper right-hand corner of the page.

4. Next, check the **Rotation Days**, click on **Go to : Rotation Days**.

   a. Once on the **Periods of the Day** page, ensure the correct rotation days copied to 19/20. If **Periods of the Day** only says STD and the school has courses that meet Monday and Wednesday or everyday but Friday, Calendar Wizard will need rerun to correct this issue. Simply adding Monday thru Friday will not resolve the issue. Calendar Wizard will need rerun.

   b. Once you have reviewed the **Rotation Days,** navigate to **StudentInformation** *» **Management** » **School Administration** » **School Year Initialization** » **Follow-up Checklist**,

   c. Put a check in the box next to **Completed** and click **Save** down at the bottom of the page.

5. Third, check the **Master Calendar Periods**. Click on **Go to : Master Calendar Periods**.

   a. Once you have reviewed the Master Calendar Periods, navigate back to **StudentInformation** » **Management** » **School Administration** » **School Year Initialization** » **Follow-up Checklist**.

   b. Put a check in the box next to **Completed** and click **Save** down at the bottom of the page.

6. Finally, check the **Review Reporting Terms**.

   a. Click on **Go to : Reporting Terms Maintenance**.

   b. Once on the **Reporting Terms Maintenance** page, ensure the dates are correct and the virtual terms copied if you chose to copy virtuals during Calendar Wizard.

   c. The reporting terms with locks were created on the second tab of Calendar Wizard when prompted for Report Card Frequency.

   d. If the **Start or Stop Dates** are incorrect, rerun Calendar Wizard .

   e. If virtual terms were chosen to be copied during Calendar Wizard, make sure the virtuals (the reporting terms without locks) did indeed copy to 19/20.

   f. If the virtuals didn't copy, rerun calendar wizard or add the virtuals by hand by clicking **Add Virtual Term**.

   g. Adjust the sort order of the reporting terms by clicking the arrows up and down until the desired sort order is achieved. Click **Save Changes** to apply the sort order changes.

   h. Remember, if the school is using interims, the interim reporting terms must follow the quarters or trimester reporting terms. See example screenshots following this task.

   i. When in doubt, report any unusual behavior on the reporting terms page to your ITC or send a Help Desk ticket to State Support.

 j. Return to ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***School Year Initialization*** *»* ***Follow-up Checklist*** and place a check in the box next to **Completed** and click **Save** down at the bottom of the page.

7. The next two items are not listed on the Follow-up Checklist, but are very important.

8. Next, navigate to ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Initialization*** *»* ***Schedule Terms***.

 a. Double check the **Schedule Term Start** and **End Dates**.

 b. Once again the **Start** and **End Dates** should not be non-attending days.

 c. The **Schedule Terms** page could look quite different from the Reporting Terms page, don't be alarmed.

9. If **Calendar Wizard** was run with **Report Card Frequency** set to 4 quarters and Course Lengths set to 9 and 12, the Schedule Terms will look very different.

10. Finally, navigate to ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Scheduling Administration*** *»* ***Master Calendar****.*

 a. Double check the **Start** and **Stop Date** to make sure they are correct.

 b. Double check the **Planned and Actual Days** to make sure they do not say zero. If the Planned and Actual say zero, please contact your ITC.

 c. If any of the above items are incorrect, rerun **Calendar Wizard**.

 d. Report any issues to your ITC or send a Help Desk ticket to State Support.

Schedule Terms

From this screen, you can view data pertaining to schedule terms.

Name	Start Date ▲	End Date	Planned Days	Actual Days
09/03/2019	Sep 03, 2019	Sep 23, 2019	15.00	15.00
09/24/2019	Sep 24, 2019	Oct 14, 2019	15.00	15.00
10/15/2019	Oct 15, 2019	Nov 01, 2019	14.00	14.00
11/04/2019	Nov 04, 2019	Nov 28, 2019	14.00	14.00
11/29/2019	Nov 29, 2019	Dec 24, 2019	18.00	18.00
12/25/2019	Dec 25, 2019	Jan 17, 2020	18.00	18.00
01/20/2020	Jan 20, 2020	Feb 07, 2020	15.00	15.00
02/10/2020	Feb 10, 2020	Feb 28, 2020	15.00	15.00
03/02/2020	Mar 02, 2020	Mar 20, 2020	15.00	15.00
03/23/2020	Mar 23, 2020	Apr 14, 2020	17.00	17.00
04/15/2020	Apr 15, 2020	May 06, 2020	16.00	16.00
05/07/2020	May 07, 2020	May 28, 2020	16.00	16.00

Master Calendar

From this screen, you can display and change data pertaining to a master calendar and calendar days.

Code:*	Master	Start Date:	9/3/2019	Planned Days: 188.00
Name:*	Master	Stop Date:	5/28/2020	Actual Days: 188.00
Daily Start Time:*	08:00 AM	Daily Stop Time:*	03:00 PM	

Task #6 - Run the first set of initialization tasks at the building level

1. At the building level and 19/20, navigate to **: _StudentInformation_ _» Management_ _» School Administration_ _» School Year Initialization_ _» Execute Tasks_**.
2. On the first tab named **Module Task List,** click the **Execute Now** button for the first 12 tasks minus the **Student: Admission** and **Fee: Prorations** task, those two tasks are now run in the 2nd and 3rd passes, respectively. (**School : Configuration – Marks : Marks Configuration**)
   a. Click **Next**.
3. Now you are on the second tab named **Required Information**.
   a. In the **Source School Year** dropdown, choose 18/19.
   b. Fill in the **New Locker Combination Series** box with the new series number. NOTE: This will only update the series in the 19/20. It will not affect the locker series of the current year.
   c. If you do not wish to update the locker combination series, ignore this field.
   d. Click **Next**.
4. Now you are on the third tab named **Confirmation**.
   a. Click **Execute**.
   b. The screen will flicker while StudentInformation processes through the selected tasks.
   c. As each task finishes, the **Status** of the task will change from **Pending** to **Complete** or **Failed**.
   d. This process could take several minutes. Do not navigate away from the page until all tasks either say **Completed** or **Failed**.
   e. If any of the tasks **Failed,** submit a Help Desk Ticket. Discontinue with SYI until you have heard back from State Support.
   f. If the process appears to be frozen (taking longer than 20 minutes), contact your ITC or send a Help Desk ticket to State Support.

Execute School Year Initialization Tasks

This wizard will allow you to initialize a school year step by step

| Module Task List | Required Information | Confirmation | Results |

Step 1: Module Task List
For each module on the task list, select the desired action and click 'Next'.

Module Name	Module Description	Do Not Execute	Skip	Execute Now	Completed	
School: Configuration	Copies basic school configuration settings to the new school year	●	○	○	☐	1st Pass
School: Staff Members	Copies the roles and settings for staff members	●	○	○	☐	
Student: Profile	Copies code values to support student profiles but no student specific data	●	○	○	☐	
Student: Admission	Copies the code values to support student admissions and creates Sub Calendar entries, but does not copy any student specific data	●	○	○	☐	2nd Pass
Student: Homerooms	Copies homeroom configuration	●	○	○	☐	1st Pass
Student: Memberships	Copies membership groups and memberships	●	○	○	☐	
Discipline	Copies code values for discipline	●	○	○	☐	
Fees	Copies basic fee configuration excluding course and course section fees	●	○	○	☐	
Fee Proration	Copies fee prorations and proration details	●	○	○	☐	3rd Pass
Attendance: Absence Events	Copies configuration and code values used by attendance	●	○	○	☐	1st Pass
Attendance: Absence Letters	Copies configuration used to generate absence letters	●	○	○	☐	
Marks: Mark Configuration	Copies configuration to support marks	●	○	○	☐	
Scheduling: Course Configuration	Copies code configuration used by course master	●	○	○	☐	2nd Pass
Scheduling: Courses	Copies course catalog and related fees	●	○	○	☐	
Scheduling: Schedule	Copies course sections and related fees	●	○	○	☐	3rd Pass
Marks: Marking Patterns	Builds marking patterns and automatic marks	●	○	○	☐	
Marks: GPAs	Configures GPA sets	●	○	○	☐	
Marks: Honor Rolls	Copies configuration used to support honor rolls	●	○	○	☐	
Course History	Copies configuration used to support course history	●	○	○	☐	

Task #7 - Complete the Follow-up Checklist for the first pass

1. Click **View Log**.
    a. After clicking **View Log,** you will be on the following page: **_StudentInformation_** » **_Management_** » **_School Administration_** » **_School Year Initialization_** » **_Job History_**.
    b. Under **Include Message Types,** check **Fatal Errors, Non-Fatal Errors, and Informational Messages**.
    c. Click **Refresh**.
    d. Pay particular attention to the **Fatal Error** messages and **Non-Fatal Error** messages.
    e. The Informational Messages detail how many of each item was copied to the new school year. The Informational Message below says 57 Discipline Policy Codes were copied to the new school year.

Message Type	Table Name	Message
Informational Message	Codes (DisciplinePolicy)	57 code(s) created

2. Now navigate to : **_StudentInformation_** » **_Management_** » **_School Administration_** » **_School Year Initialization_** » **_Follow-up Checklist_**.
    a. Just like after running **Calendar Wizard** each of the eleven initialization tasks has a follow-up task.
    b. Click on each of the **Go to** links and verify the information was copied to 19/20.
    c. After completing each Follow-up task, return to the **Follow-up Checklist** page and place a check in the box next to **Completed** and click **Save**.
    d. All follow-up tasks are important, but the next several follow-up task detailed in the next steps are notable and worth spending extra time on.
    e. The 2nd task named School: Staff Members now copies Staff Impersonations to the new school year. Verify each staff member and add or delete any impersonations that are no longer needed.
    f. The 5th follow-up task is named **Homeroom Terms**. This task is <u>crucial</u> for any school using Homerooms. Follow the Go to link which takes you to the **Homeroom Term Maintenance**. Link the appropriate schedule terms to the Homeroom Term or Terms and Click **Save.** If you do not use Homerooms, this follow-up task can be skipped.

Homeroom Terms Maintenance

From this screen, you can display and change data pertaining to homeroom terms.

[Add Homeroom Term] [Save Changes] [Cancel Changes]

		Code	Name	Schedule Terms	Start Date	End Date	Planned Days	Actual Days	Sort Order	Active
🗑 ✏ 👤	⬇	FullYear	Full Year Term	09/03/2019, 09/24/2019, 10/15/2019, 11/04/2019, 11/29/2019, 12/25/2019, 01/20/2020, 02/10/2020, 03/02/2020, 03/23/2020, 04/15/2020, 05/07/2020	Sep 03, 2019	May 28, 2020	188.00	188.00	1	🟢
🗑 ✏ 👤 ⬆	⬇	SEM1	Semester 1	09/03/2019, 09/24/2019, 10/15/2019, 11/04/2019, 11/29/2019, 12/25/2019	Sep 03, 2019	Jan 17, 2020	94.00	94.00	2	🟢
🗑 ✏ 👤 ⬆		SEM2	Semester 2	01/20/2020, 02/10/2020, 03/02/2020, 03/23/2020, 04/15/2020, 05/07/2020	Jan 20, 2020	May 28, 2020	94.00	94.00	3	🟢

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    g. The 6th follow-up task is named **Fee Accounting Options**. Fees cannot be assigned until the schedule is finalized in the future year, which usually does not happen until late summer. Consult the **Fees**

> *Procedural Checklist* when the school is ready to assign fees to help determine which checkboxes should be checked. At this time, since fees cannot be assigned until the schedule is finalized, it does not matter which options are marked.
>
> h. The 7th follow-up task is named *Update Attendance Configuration*. Follow the *Go to* link to the *StudentInformation Options* page. Click on the *Attendance* tab and verify the attendance setup.
> i. The 8th follow-up task is named *Review Marks Options*. Click on the *Go to* which takes you once again to the *StudentInformation Options* page. Click on the *Marks* tab and verify the configuration.
>
> 3. Now the 2nd pass of initialization can be completed.

Rooms and Locations are not school year specific. If you change the capacity, for example, of a room in 19/20 it will change the capacity of the room/location in 18/19. This is by design. The only item this will affect is if you would print a student's schedule in 18/19, the room numbers might not be correct.

Homerooms are school year specific which means if you change the capacity, for example, in the future school year it will not affect the capacity in the current school year.

Task #8 - Run the second set of initialization tasks at the building level

1. At the building level and 19/20, return to*: **StudentInformation** *» **Management** » **School Administration** » **School Year Initialization** » **Execute Tasks**.
2. On the first tab named **Module Task List,** click the **Execute Now** button for **Student : Admission**, **Scheduling : Course Configuration** and **Scheduling Courses**)
   a. Click **Next**.
3. Now the second tab named **Required Information** is displayed.
   a. In the **Source School Year** dropdown, choose 18/19.
   b. Click **Next**.
4. Now you are on the third tab named **Confirmation**.
   a. Click **Execute**.
   b. The screen will flicker while StudentInformation processes through the selected tasks.
   c. As each task finishes,the **Status** of the task will change from **Pending** to **Complete** or **Failed**.
   d. This process could take several minutes. Do not navigate away from the page until all tasks either say **Completed** or **Failed**.
   e. If any of the tasks **Failed,** submit a Help Desk Ticket. Discontinue with SYI until you have heard back from State Support.
   f. If the process appears to be frozen (taking longer than 20 minutes), contact your ITC or send a Help Desk ticket to State Support immediately.

Execute School Year Initialization Tasks

This wizard will allow you to initialize a school year step by step

| Module Task List | Required Information | Confirmation | Results |

Step 1: Module Task List
For each module on the task list, select the desired action and click 'Next'.

Module Name	Module Description	Do Not Execute	Skip	Execute Now	Completed	
School: Configuration	Copies basic school configuration settings to the new school year	◉	○	○	☐	
School: Staff Members	Copies the roles and settings for staff members	◉	○	○	☐	1st Pass
Student: Profile	Copies code values to support student profiles but no student specific data	◉	○	○	☐	
Student: Admission	Copies the code values to support student admissions and creates Sub Calendar entries, but does not copy any student specific data	◉	○	○	☐	2nd Pass
Student: Homerooms	Copies homeroom configuration	◉	○	○	☐	1st Pass
Student: Memberships	Copies membership groups and memberships	◉	○	○	☐	
Discipline	Copies code values for discipline	◉	○	○	☐	
Fees	Copies basic fee configuration excluding course and course section fees	◉	○	○	☐	
Fee Proration	Copies fee prorations and proration details	◉	○	○	☐	3rd Pass
Attendance: Absence Events	Copies configuration and code values used by attendance	◉	○	○	☐	1st Pass
Attendance: Absence Letters	Copies configuration used to generate absence letters	◉	○	○	☐	
Marks: Mark Configuration	Copies configuration to support marks	◉	○	○	☐	
Scheduling: Course Configuration	Copies code configuration used by course master	◉	○	○	☐	2nd Pass
Scheduling: Courses	Copies course catalog and related fees	◉	○	○	☐	
Scheduling: Schedule	Copies course sections and related fees	◉	○	○	☐	
Marks: Marking Patterns	Builds marking patterns and automatic marks	◉	○	○	☐	3rd Pass
Marks: GPAs	Configures GPA sets	◉	○	○	☐	
Marks: Honor Rolls	Copies configuration used to support honor rolls	◉	○	○	☐	
Course History	Copies configuration used to support course history	◉	○	○	☐	

Task #9 - Complete the Follow-up Checklist for the second pass

1. Click **View Log.**
2. After clicking **View Log,** you will be on the following page: **StudentInformation » Management » School Administration » School Year Initialization » Job History**.
   a. Under **Include Message Types,** check **Fatal Errors, Non-Fatal Errors, and Informational Messages**.
   b. Click **Refresh**.
   c. Pay particular attention to the **Fatal Error** messages and **Non-Fatal Error** messages.
   d. The Informational Messages detail how many of each item was copied to the new school year.
3. Now navigate to : **StudentInformation » Management » School Administration » School Year Initialization » Follow-up Checklist**.
   a. The **Sub-Calendar Exception Days** requires you to enter the exceptions to the sub-calendars. SYI only copies the sub-calendar codes. SYI does not copy the exceptions from 18/19 since they differ from year to year. If all the non-attending days are not known at this time, this task can be completed at a later time.
   b. The **Review Scheduling Options** allows you to choose **Default Calendar** on **StudentInformation Options**. The only thing the **Default Calendar** is used for is registration. If a new student is registered, they will be placed on the calendar listed as the default on **StudentInformation Options**. The user always has the option of changing the calendar when registering the student.
   c. Click on the **Go to : Course Terms** link.
   d. Once on the **Course Terms Maintenance** page, edit each Course Term and link the appropriate schedule terms to the course term.
   e. Click **Save** to commit changes.
4. Now the 3rd and final pass of SYI can be executed.

Course Terms Maintenance

From this screen, you can display, add, change and delete data pertaining to course terms.

[Add Course Term] [Save Changes] [Cancel Changes]

Reporting Terms				Qtr1			Int1	Qtr2			Int2	Ex1	Sem1	Qtr3			Int3	Qtr4			Int4	Ex2	Sem2	Fin
Schedule Terms				09/03/2019	09/24/2019	10/15/2019		11/04/2019	11/29/2019	12/25/2019				01/20/2020	02/10/2020	03/02/2020		03/23/2020	04/15/2020	05/07/2020				
	Term Code	Term Name	Sort Order																					
🗑 ✎ ↓ Q	FULL	Full Year	1	X	X	X		X	X	X				X	X	X		X	X	X				●
🗑 ✎ ↑ ↓ Q	SEM1	1st Semester	2	X	X	X		X	X	X														●
🗑 ✎ ↑ ↓ Q	SEM2	2nd semester	3											X	X	X		X	X	X				●
🗑 ✎ ↑ ↓ Q	QTR1	Quarter 1	4	X	X	X																		●
🗑 ✎ ↑ ↓ Q	QTR2	Quarter 2	5					X	X	X														●
🗑 ✎ ↑ ↓ Q	Qtr3	Quarter 3	6											X	X	X								●
🗑 ✎ ↑ Q	Qtr4	Quarter 4	7															X	X	X				●

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Task #10 - Run the third set of initialization tasks at the building level.

1. At the building level and 19/20, return to *:*
   StudentInformation *»* ***Management*** *»* ***School Administration*** *»* ***School Year Initialization*** *»* ***Execute Tasks***.
2. On the first tab named ***Module Task List,*** click ***Execute Now*** for the last 5 tasks plus the Fee Proration task. (***Scheduling : Schedule - Course History***)
   a. Click ***Next***.
3. Now the second tab named ***Required Information*** is displayed.
4. In the ***Source School Year*** dropdown, choose 18/19.
   a. The final pass of SYI requires you to verify and map information unlike any previous passes.
   b. The ***Source Report Term*** needs mapped to the ***Target Report Term***. If virtual terms were copied up in Calendar Wizard, all of this information should already be mapped and you will just need to verify it.
   c. If any of the dropdowns say ***Do Not Load,*** verify the Reporting Term will not be used in 19/20. If you are sure it should not be loaded, keep the dropdown at ***Do Not Load***, otherwise map it to the correct value.
   d. The next section named ***Source Course Term*** to ***Target Course Term*** maps the current year's course terms to 19/20's course terms. This step helps ensure all of last year's Semester 1 only classes are Semester 1 only classes in 19/20 as an example.
   e. The final section named ***Source Period*** to ***Target Period*** maps the current year's periods to 19/20's periods and ensures meeting times for course sections copy up properly.
   f. In the example screenshot below, Course Term Q1 & Periods 9 and 10 are marked as ***Do Not Load*** because the school is no longer using that course term or those two periods and do not want them copied to 19/20.
   g. Click ***Next***.
5. Now you are on the third tab named ***Confirmation***.
   a. Click ***Execute***.
   b. The screen will flicker while StudentInformation processes through the selected tasks.
   c. As each task finishes the ***Status*** of the task will change from ***Pending*** to ***Complete*** or ***Failed***.
   d. This process could take several minutes. Do not navigate away from the page until all tasks either say ***Completed*** or ***Failed***.
   e. If any of the tasks ***Failed,*** submit a Help Desk Ticket. Discontinue with SYI until you have heard back from State Support.
   f. If the process appears to be frozen (taking longer than 20 minutes), contact your ITC or send a Help Desk ticket to State Support immediately.

Execute School Year Initialization Tasks

This wizard will allow you to initialize a school year step by step

Module Task List	Required Information	Confirmation	Results

Step 1: Module Task List
For each module on the task list, select the desired action and click 'Next'.

Module Name	Module Description	Do Not Execute	Skip	Execute Now	Completed	
School: Configuration	Copies basic school configuration settings to the new school year	●	○	○	☐	
School: Staff Members	Copies the roles and settings for staff members	●	○	○	☐	1st Pass
Student: Profile	Copies code values to support student profiles but no student specific data	●	○	○	☐	
Student: Admission	Copies the code values to support student admissions and creates Sub Calendar entries, but does not copy any student specific data	●	○	○	☐	2nd Pass
Student: Homerooms	Copies homeroom configuration	●	○	○	☐	
Student: Memberships	Copies membership groups and memberships	●	○	○	☐	1st Pass
Discipline	Copies code values for discipline	●	○	○	☐	
Fees	Copies basic fee configuration excluding course and course section fees	●	○	○	☐	
Fee Proration	Copies fee prorations and proration details	●	○	○	☐	3rd Pass
Attendance: Absence Events	Copies configuration and code values used by attendance	●	○	○	☐	
Attendance: Absence Letters	Copies configuration used to generate absence letters	●	○	○	☐	1st Pass
Marks: Mark Configuration	Copies configuration to support marks	●	○	○	☐	
Scheduling: Course Configuration	Copies code configuration used by course master	●	○	○	☐	
Scheduling: Courses	Copies course catalog and related fees	●	○	○	☐	2nd Pass
Scheduling: Schedule	Copies course sections and related fees	●	○	○	☐	
Marks: Marking Patterns	Builds marking patterns and automatic marks	●	○	○	☐	
Marks: GPAs	Configures GPA sets	●	○	○	☐	3rd Pass
Marks: Honor Rolls	Copies configuration used to support honor rolls	●	○	○	☐	
Course History	Copies configuration used to support course history	●	○	○	☐	

Source Course Term		Target Course Term
Q1 – Quarter 1	→	-- DO NOT LOAD --
S1 – Semester 1	→	S1 – Semester 1
S2 – Semester 2	→	S2 – Semester 2
All – All Year	→	All – All Year

Source Period		Target Period
Day: M – Period: 01	→	Day: M – Period: 01
Day: M – Period: 02	→	Day: M – Period: 02
Day: M – Period: 03	→	Day: M – Period: 03
Day: M – Period: 04	→	Day: M – Period: 04
Day: M – Period: 05	→	Day: M – Period: 05
Day: M – Period: LUN1	→	Day: M – Period: LUN1
Day: M – Period: LUN2	→	Day: M – Period: LUN2
Day: M – Period: 06	→	Day: M – Period: 06
Day: M – Period: 07	→	Day: M – Period: 07
Day: M – Period: 08	→	Day: M – Period: 08
-- DO NOT LOAD --	→	Day: M – Period: 09
-- DO NOT LOAD --	→	Day: M – Period: 10

Task #11 - Complete the Follow-up Checklist for the third pass

F.Y.I. Since course sections and marking patterns are copied from the prior year each marking pattern in the new school year will need edited and saved – this will link the course sections to the marking pattern.

1. Click *View Log*.
   a. After clicking *View Log,* you will be on the following page: *StudentInformation* » *Management* » *School Administration* » *School Year Initialization* » *Job History*.
   b. Under *Include Message Types* check *Fatal Errors, Non-Fatal Errors, and Informational Messages*
   c. Click *Refresh*.
   d. Pay particular attention to the *Fatal Error* messages and *Non-Fatal Error* messages.
   e. The Informational Messages detail how many of each item was copied to the new school year.
2. Now navigate to : *StudentInformation* » *Management* » *School Administration* » *School Year Initialization* » *Follow-up Checklist*.
   a. Complete the follow-up tasks.
   b. Follow the *Go to : Course Sections* link and verify the course sections and meeting times copied correctly.
   c. The task named *Update Fee Definitions* copies up the course fees, general fees, miscellaneous, membership, program fees, and proration tables.
   d. Click on the *Go to : Fees Administration* link and verify the fees copied correctly.
   e. The task named *Custom Meeting Times* copies the course sections and meeting times to 19/20.
   f. The task named *Review Marking Patterns* copies marking patterns and marking pattern rules to 19/20.
   g. Follow the *Go to* link to the marking pattern page and verify the marking patterns copied.
   h. Also verify Automatic Marks copied correctly by going to *StudentInformation* » *Management* » *School Administration* » *Marks Administration Menu* » *Automatic Mark Maintenance*.
   i. The task named *Review GPA Sets* copies GPA sets from the current year to 19/20. Follow the *Go to* link to the *GPA Set Maintenance* page and edit each GPA to verify the information on each tab copied forward.
   j. The last task named *Review Honor Rolls* copies Honor Rolls setup in the current year to 19/20. Follow the *Go to* link to the *Honor Roll*

Set Maintenance page to verify the honor rolls and honor roll exclusions copied forward.

k. If you find any information that did not copy, report this to your ITC or to State Support in a Help Desk ticket.

Task #12 - Create Default Result Set

1. At the building level and 19/20, navigate to ***StudentInformation
   » Management » School Administration » Scheduling
   Administration » Scheduler » Schedule Result Sets*** to create a
   Schedule Result Set.
   a. On the **Schedule Result Sets** page in the **Filter By Schedule**
      dropdown, choose a Master Schedule. Typically there is only one
      schedule in the dropdown.
   b. Click **Add Schedule Result**.
   c. Enter a name in the **Name** field. State Support recommends naming it
      Default Schedule Result.
   d. Click **Save**.

**You've just completed SYI!
Give yourself a pat on the back.**

Appendix A - Rerunning Calendar Wizard

> **WARNING WHEN RE-RUNNING CALENDAR WIZARD!** Use extreme caution when re-running Calendar Wizard. Rerunning Calendar Wizard wipes out course section assignments – this cannot be restored.

Rerunning Calendar Wizard :
1. Will undo certain School Year Initialization tasks which are highlighted below.
2. Will *delete* all students from the year in context.

Follow-up steps after rerunning Calendar Wizard:

1. Bulk Enrollment will need rerun. Once Bulk Enrollment is redone, the students will now have an admission record for the year and building in context. Their course requests will reappear but their course section assignments will be permanently deleted.
2. Reregister students that are newly admitted to the district.

Tasks Undone:
Student: Admission
Student: Homerooms
Attendance: Absence Events
Scheduling: Course Configuration
Scheduling: Courses
Scheduling: Schedule
Marks: Marking Patterns
Marks: GPAs
Marks: Honor Rolls

Execute School Year Initialization Tasks

This wizard will allow you to initialize a school year step by step

| Module Task List | Required Information | Confirmation | Results |

Step 1: Module Task List
For each module on the task list, select the desired action and click 'Next'.

Module Name	Module Description	Do Not Execute	Skip	Execute Now	Completed
School: Configuration	Copies basic school configuration settings to the new school year	●	○	○	☑
School: Staff Members	Copies the roles and settings for staff members	●	○	○	☑
Student: Profile	Copies code values to support student profiles but no student specific data	●	○	○	☑
Student: Admission	Copies the code values to support student admissions and creates Sub Calendar entries, but does not copy any student specific data	○	○	●	☐
Student: Homerooms	Copies homeroom configuration	○	○	●	☐
Student: Memberships	Copies membership groups and memberships	●	○	○	☑
Discipline	Copies code values for discipline	●	○	○	☑
Fees	Copies basic fee configuration excluding course and course section fees	●	○	○	☑
Fee Proration	Copies fee prorations and proration details	●	○	○	☑
Attendance: Absence Events	Copies configuration and code values used by attendance	○	○	●	☐
Attendance: Absence Letters	Copies configuration used to generate absence letters	●	○	○	☑
Marks: Mark Configuration	Copies configuration to support marks	●	○	○	☑
Scheduling: Course Configuration	Copies code configuration used by course master	○	○	●	☐
Scheduling: Courses	Copies course catalog and related fees	○	○	●	☐
Scheduling: Schedule	Copies course sections and related fees	○	○	●	☐
Marks: Marking Patterns	Builds marking patterns and automatic marks	○	○	●	☐
Marks: GPAs	Configures GPA sets	○	○	●	☐
Marks: Honor Rolls	Copies configuration used to support honor rolls	○	○	●	☐
Course History	Copies configuration used to support course history	●	○	○	☑

Next >

When the Calendar Wizard loads, if it has been run before, the following message will appear:

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

Are you sure you want to run the Calendar Wizard again?
All Absences, Marks, GPA/Honor Rolls, Marking Patterns, Course Section Assignments, Schedules, Homerooms, and Terms will be deleted and you will need to rerun Student Promotion and Student Bulk Enrollment.
To continue, click OK, otherwise click Cancel.

OK   Cancel

If you hit Cancel, the following message will appear:

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

You have chosen not to re-run the Calendar Wizard.

Appendix B – Rerunning Calendar Wizard or using Calendar Dates Wizard to correct issues

Problem	Rerun Calendar Wizard to fix	Use Calendar Dates Wizard to fix
School picked the wrong type of rotation day (Fixed vs. Alternating Rotation Day)	Yes – tasks will be undone and scheduling lost	No
Four quarters were chosen during Calendar Wizard and school is switching to 6 week classes	Yes– tasks will be undone and scheduling lost	No
Calendar Wizard was run with quarter, semester and all year course lengths chosen and school also offers 6 week classes	Yes– tasks will be undone and scheduling lost	No
First or last day of school is incorrect	Yes– tasks will be undone and scheduling lost	Yes – no data loss
Schedule term stop and start dates are incorrect	No	Yes – no data loss
Reporting Term stop and start dates are incorrect	Yes– tasks will be undone and scheduling lost	No

Please see "WARNING WHEN RE-RUNNING CALENDAR WIZARD!" in Appendix A.

Appendix C – How to change locker combination series after school year initialization is complete

Occasionally a school will want to change the locker combination series assigned to each locker. Rerunning SYI Task #1 will change the locker combination series in the upcoming year.

> Rerunning this task will not affect scheduling in anyway, regardless if the schedule is finalized or not.
> Rerunning the task will not cause any other SYI tasks to be undone.
> The first task copies the following information to the upcoming school year:
> 1. Grade Level Progressions
> 2. Building Grade Levels
> 3. STUDENTINFORMATION Options
> 4. Lockers

Execute School Year Initialization Tasks
This wizard will allow you to initialize a school year step by step

Module Task List	Required Information	Confirmation	Results

Step 1: Module Task List
For each module on the task list, select the desired action and click 'Next'.

Module Name	Module Description	Do Not Execute	Skip	Execute Now	Completed
School: Configuration	Copies basic school configuration settings to the new school year	☐	○	◉	☑

Execute School Year Initialization Tasks
This wizard will allow you to initialize a school year step by step

Module Task List	Required Information	Confirmation	Results

Step 2: Required Information
In order to process the selected tasks, some additional information is required. Please complete the form below and click 'Next'.

Source School Year: 2018-2019 ▼

New Locker Combination Series: 2 🔒 ⓘ

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